

FREE FINANCIAL PLANNING HANDBOOK FOR PHYSICIANS AND ADVISORS

Financial Planning Handbook for Physicians and Advisors

Financial Planning for Physicians and Advisors describes a personal financial planning program to help doctors avoid the perils of harsh economic sacrifice. It outlines how to select a knowledgeable financial advisor and develop a comprehensive personal financial plan, and includes important sections on: insurance and risk management, asset diversification and modern portfolio construction, income tax and retirement planning, and succession and estate planning. When fully implemented with a professional's assistance, this book will help physicians and their financial advisors develop an effective long-term financial plan.

Financial Planning Basics for Doctors

Financial Planning Basics for Doctors is a comprehensive guide on building a long-term financial plan for doctors and their families. Subjects covered include student loans, home buying, disability insurance, estate planning, college planning, retirement planning, investments, and behavioral finance, among many others. Each chapter starts with the basics before addressing more advanced concepts, frequently with examples and graphs, and concludes with a concise summary of the key takeaways. Throughout the book, there are links to free downloadable spreadsheets and a planning checklist to help you jump-start and organize your financial plan. The content provided is a result of the feedback the authors have received over thousands of meetings with doctors, condensed into a thorough overview of the most relevant ideas. Teaching hospitals do an excellent job of training our next generation of doctors, yet most new physicians graduate without having had a class on managing their finances. This book was written to fill that knowledge gap. Marshall Weintraub, Michael Merrill, and Cole Kimball are financial advisors with Finity Group, LLC, a financial planning firm specializing in working with doctors.

Comprehensive Financial Planning Strategies for Doctors and Advisors

Drawing on the expertise of multi-degreed doctors, and multi-certified financial advisors, Comprehensive Financial Planning Strategies for Doctors and Advisors: Best Practices from Leading Consultants and Certified Medical Planners™ will shape the industry landscape for the next generation as the current ecosystem strives to keep pace. Traditional generic products and sales-driven advice will yield to a new breed of deeply informed financial advisor or Certified Medical Planner™. The profession is set to be transformed by "cognitive-disruptors" that will significantly impact the \$2.8 trillion healthcare marketplace for those financial consultants serving this challenging sector. There will be winners and losers. The text, which contains 24 chapters and champions healthcare providers while informing financial advisors, is divided into four sections complete with glossary of terms, CMPTM curriculum content, and related information sources. For ALL medical providers and financial industry practitioners For NEW medical providers and financial industry practitioners For MID-CAREER medical providers and financial industry practitioners For MATURE medical providers and financial industry practitioners Using an engaging style, the book is filled with authoritative guidance and healthcare-centered discussions, providing the tools and techniques to create a personalized financial plan using professional advice. Comprehensive coverage includes topics like behavioral finance, modern portfolio theory, the capital asset pricing model, and arbitrage pricing theory; as well as insider insights on commercial real estate; high frequency trading platforms and robo-advisors; the Patriot and Sarbanes–Oxley Acts; hospital endowment fund management, ethical wills, giving, and legacy planning; and divorce and other special situations. The result is a codified "must-have" book, for all health

industry participants, and those seeking advice from the growing cadre of financial consultants and Certified Medical Planners™ who seek to "do well by doing good," dispensing granular physician-centric financial advice: Omnia pro medicus-clientis. RAISING THE BAR The informed voice of a new generation of fiduciary advisors for healthcare

Advice Only

When it comes to consequential retirement decisions, more and more people are preferring to pay their financial advisors directly for upfront planning advice in lieu of traditional asset management fees and commissions. This book explores how advisors of the future without any ambiguity will need to offer complete financial plans & cohesive strategies prior to any discussion of new product implementation. The first planning book of its kind, we will introduce Advice Only as the fundamental belief by some clients that a financial planning strategy will only ever feel complete if -and only if- it is developed in total isolation from any form of financial solicitation and implementation. This planning approach is sure to contribute to the disruption of the financial services industry and advice-giving as we know it today. Readers will learn THEY hold the keys necessary to change how financial advice is delivered, not necessarily the financial institutions or through government regulation. "Advice Only" is a handbook developed for today's retiree covering all 9 areas of comprehensive financial planning and has over 300 pages of easy to understand financial planning topics, charts, graphs, and anecdotes. "Advice Only" was developed over 9 years of teaching retirement planning primarily through the College of Marin, listening to students, and providing financial planning services to retirees in the San Francisco Bay Area. This book will provide new retirees with the information needed not only to be financially successful in retirement but also to discover the right financial planning methodology for them. Additionally, we'll explore other subjective investment and tax-related approaches to help determine your personalized retirement philosophy. You'll learn the importance of having a plan that is proven viable with math and gives you what you want, but is still flexible enough to work under a variety of scenarios - not just the ideal one. Learn more at AdviceOnly.info

Planning a Successful Future

A deeply insightful guide to goal-based financial planning and wealth management Planning a Successful Future empowers advisors and clients to take control of their money and manage their income to achieve their financial goals. Written by the father of fee-only financial planning, this book features real-life stories and examples from over three decades in the industry to illustrate how financial planning works and the best way to create your strategy. You'll learn how to identify and prioritize your goals, and why they're important—and how to get where you need to be for retirement, education, home ownership, and more. Practical exercises get you started on the right track, and useful checklists keep you organized and focused along the way. You'll get expert insight on risk management, allocation, tax reduction, estate planning, and more, as you develop your strategy and put it into action. The financial services industry undergoes frequent changes, and financial planning specifically is affected to a high degree. Keeping up with the latest news and distinguishing trend from legitimate methodology can itself be a fulltime job. This book gives you the background you need to create a plan, and make the smart choices that will help you grow and protect your wealth. Create a realistic and goal-based financial plan Take a more proactive approach to your finances Identify your goals and how to achieve them Allocate investments appropriately for your situation Financial planning is complex, with many variables to analyze and outside forces that can derail even the best laid plans. Planning a Successful Future gives you the information, tools, strategies, and insight you need to make the best decisions for your financial future.

Insurance and Risk Management Strategies for Physicians and Advisors

This book fulfills its promise as a peerless tool for physicians wanting to make good decisions about the risks they face.

The Financial Planning Competency Handbook

Whether you're studying to become a financial planner or a practitioner looking for a comprehensive reference to help serve your clients' needs, this is the ultimate guide. Developed by Certified Financial Planner Board of Standards, Inc. (CFP Board), the Financial Planning Competency Handbook gives you everything you need to meet the daily challenges of your current or future profession. This all-inclusive handbook covers the entire list of nearly 90 vital topics on integrated financial planning, including such major components as: General Principles of Finance and Financial Planning Insurance Planning Employee Benefits Planning Investment and Securities Planning State and Federal Income Tax Planning Estate Tax, Gift Tax, and Transfer Tax Planning Retirement Planning Estate Planning Principles of Communication and Counseling And more

AMA Physician's Guide to Financial Planning

"A resource to help physicians in debt management, insurance, tax planning and real estate"--Provided by publisher.

Real Life Financial Planning for the New Physician

All of the unique financial needs of a physician have been merged into a very manageable and easy-to-implement strategy. You will learn how to prioritize multiple decisions and manage your complex financial life. The result is a financial plan that decreases worry and stress, knowing that you are in control and are systematically building and protecting your wealth. There is an amazing amount of practical advice packed into this book based on the wisdom gained from more than 20,000 individual meetings that the authors have had with their clients.

Financial Planning Competency Handbook

The official guide for exam success and career excellence Financial Planning Competency Handbook, Second Edition is the essential reference for those at any stage of certification and a one-stop resource for practitioners looking to better serve their clients. This fully updated second edition includes brand new content on connections diagrams, new case studies, and new instructional videos, and a completely new section devoted to the interdisciplinary nature of financial planning. You'll gain insights from diverse fields like psychology, behavioral finance, communication, and marriage and family therapy to help you better connect with and guide your clients, alongside the detailed financial knowledge you need to perform to the highest expectations as a financial planner. This book contains over ninety chapters that are essential for practitioners, students, and faculty. Whether a practitioner, student, or faculty member, this guide is the invaluable reference you need at your fingertips. Comprehensive, clear, and detailed, this handbook forms the foundation of the smart financial planner's library. Each jurisdiction has its own laws and regulations surrounding financial planning, but the information in this book represents the core body of knowledge the profession demands no matter where you practice. Financial Planning Competency Handbook, Second Edition guides you from student to practitioner and far beyond, with the information you need when you need it.

Real Life Financial Planning for the Medical Professional

In the era of managed care, every physician--and every CPA advising physicians--needs this financial survival handbook. You'll learn the fundamental concepts of financial planning, how to maintain a profitable practice, The essentials of insurance planning, medical risk management issues, how to overcome tax dilemmas, investment planning techniques, asset protection strategies, and more. The accompanying CD-ROM features the forms, tables, charts, spreadsheets, graphs, and other sample documents used in the text, including net worth statement preparation documents and sample financial plans.

Financial Planning for Physicians and Healthcare Professionals 2002

In this book, a world-class editorial advisory board and an independent team of contributors draw on their experience in operations, leadership, and Lean managerial decision making to share helpful insights on the valuation of hospitals in today's changing reimbursement and regulatory environments. Using language that is easy to understand, *Financial Management Strategies for Hospitals and Healthcare Organizations: Tools, Techniques, Checklists and Case Studies* integrates prose, managerial applications, and regulatory policies with real-world case studies, models, checklists, reports, charts, tables, and diagrams. It has a natural flow, starting with costs and revenues, progressing to clinic and technology, and finishing with institutional and professional benchmarking. The book is organized into three sections: *Costs and Revenues: Fundamental Principles Clinic and Technology: Contemporary Issues Institutional and Professional Benchmarking: Advanced Applications*. The text uses healthcare financial management case studies to illustrate Lean management and operation strategies that are essential for healthcare facility administrators, comptrollers, physician-executives, and consulting business advisors. Discussing the advancement of financial management and health economic principles in healthcare, the book includes coverage of the financial features of electronic medical records, financial and clinical features of hospital information systems, entity cost reduction models, the financial future of mental health programs, and hospital revenue enhancements.

Financial Management Strategies for Hospitals and Healthcare Organizations

Growth in the financial planning field has skyrocketed -- drawing professionals from accounting and financial services to investment management. Now there is a book that addresses the needs of individuals contemplating or beginning careers in financial planning. This book presents a blueprint for launching a successful future in a lucrative, exciting profession. Noted financial planning practitioner Jeffrey Rattiner covers everything aspiring and beginning planners need to know. He takes the reader through the basics of what financial planners do and provides insight about where the field is headed. Topics include education and certification requirements, options for specialization, fee structures, logistics and technology, compliance, and legal issues. Rattiner also shows planners the best methods for client prospecting and marketing, and lists helpful resources for ongoing education. This easy-to-use guide gives a direct, turnkey approach to entering the field and setting up a financial planning practice. Special forms, checklists, and other useful tools reinforce the hands-on appeal of this practical guide.

Real Life Financial Planning for the New Physician

A Client-Centered approach to Financial Planning Practice built by Research for Practitioners The second in the CFP Board Center for Financial Planning Series, *Client Psychology* explores the biases, behaviors, and perceptions that impact client decision-making and overall financial well-being. This book, written for practitioners, researchers, and educators, outlines the theory behind many of these areas while also explicitly stating how these related areas directly impact financial planning practice. Additionally, some chapters build an argument based solely upon theory while others will have exclusively practical applications. Defines an entirely new area of focus within financial planning practice and research: *Client Psychology Serves as the essential reference for financial planners on client psychology Builds upon and expands the body of knowledge for financial planning Provides insight regarding the factors that impact client financial decision-making from a multidisciplinary approach* If you're a CFP® professional, researcher, financial advisor, or student pursuing a career in financial planning or financial services, this book deserves a prominent spot on your professional bookshelf.

Getting Started as a Financial Planner

This book is everything you need to plan for your financial future and avoid paying tens of thousands of dollars to a financial advisor. A financial plan will guide you during good and bad times, ups and downs of

the market, job changes, and financial setbacks. Creating a financial plan is not all about money, budgeting, and investing. It's about enabling you to live the life you truly want. As you progress through your career in medicine, you have never been taught how to prepare for a healthy financial future, leaving you vulnerable to being sold products you don't need or working so hard that you experience burnout. Physicians are the smartest people on the planet when it comes to medicine, so why not finances too? Let's change the dynamic between money and medicine and help you live your ideal life.

Client Psychology

Learn what it takes to be a success from the 'all-stars' of the financial planning and advisory profession. Financial planning involves everything from determining the client's financial position, cash flow, and investment strategies, to income tax planning, risk management, insurance, and retirement and estate planning. Financial planners and advisors are responsible for recommendations and decisions that help people define and achieve their financial goals. *Rattiner's Secrets of Financial Planning* gives industry professionals the opportunity to hear and learn from 'the best of the best' in the field. Author Jeffrey H. Rattiner, a respected leader in Certified Financial Planning (CFP), shares real-world insights and expert advice from hundreds of top-level advisors in the financial planning industry. Readers gain firsthand knowledge of the challenges these successful planners have faced and how they continue to build their practices and reap success in a dynamic financial environment. This comprehensive resource includes templates based on what the best CFPs use in their practices for work programs, data quantification reports, asset allocation model portfolios, pro forma statements, and checklists for each technical financial planning discipline. Designed specifically for industry professionals, this in-depth book: Offers CFPs and financial advisors proven advice and practical methods to take their practice to the next level. Includes contributions from and interviews with the leading advisors in the profession. Provides templates taken from the practices of high-level financial advisors. Explains the key ingredients for building a superior financial planning practice. Helps develop successful financial planners and strengthen profitable practices. *Rattiner's Secrets of Financial Planning: From Running Your Practice to Optimizing Your Client's Experience* is an important resource for CFPs, CPAs, financial advisors, financial planners, and high-level corporate executives working in the financial services industry.

Financial Residency

Mainstay reference guide for wealth management, newly updated for today's investment landscape. For over a decade, *The New Wealth Management: The Financial Advisor's Guide to Managing and Investing Client Assets* has provided financial planners with detailed, step-by-step guidance on developing an optimal asset allocation policy for their clients. And, it did so without resorting to simplistic model portfolios, such as lifecycle models or black box solutions. Today, while *The New Wealth Management* still provides a thorough background on investment theories, and includes many ready to use client presentations and questionnaires, the guide is newly updated to meet twenty-first century investment challenges. The book includes expert updates from Chartered Financial Analyst (CFA) Institute, in addition to the core text of 1997's first edition – endorsed by investment luminaries Charles Schwab and John Bogle. Presents an approach that places achieving client objectives ahead of investment vehicles. Applicable for self-study or classroom use. Now, as in 1997, *The New Wealth Management* effectively blends investment theory and real world applications. And in today's new investment landscaped, this update to the classic reference is more important than ever.

Rattiner's Secrets of Financial Planning

Praise for the previous edition: "This comprehensive multi-authored text contains over 450 pages of highly specific and well-documented information that will be interest to physicians in private practice, academics, and in medical management. . . [Chapters are] readable, concise yet complete, and well developed. I could have used a book like this in the past, I will certainly refer to it frequently now." 4 stars Carol EH Scott-

Conner, MD, PhD, MBA American College of Physician Executives Does Health 2.0 enhance or detract from traditional medical care delivery, and can private practice business models survive? How does transparent business information and reimbursement data impact the modern competitive healthcare scene? How are medical practices, clinics, and physicians evolving as a result of rapid health- and non-health-related technology change? Does transparent quality information affect the private practice ecosystem? Answering these questions and more, this newly updated and revised edition is an essential tool for doctors, nurses, and healthcare administrators; management and business consultants; accountants; and medical, dental, business, and healthcare administration graduate and doctoral students. Written in plain language using nontechnical jargon, the text presents a progressive discussion of management and operation strategies. It incorporates prose, news reports, and regulatory and academic perspectives with Health 2.0 examples, and blog and internet links, as well as charts, tables, diagrams, and Web site references, resulting in an all-encompassing resource. It integrates various medical practice business disciplines—from finance and economics to marketing to the strategic management sciences—to improve patient outcomes and achieve best practices in the healthcare administration field. With contributions by a world-class team of expert authors, the third edition covers brand-new information, including: The impact of Web 2.0 technologies on the healthcare industry Internal office controls for preventing fraud and abuse Physician compensation with pay-for-performance trend analysis Healthcare marketing, advertising, CRM, and public relations eMRs, mobile IT systems, medical devices, and cloud computing and much more!

The New Wealth Management

Whether you're studying to become a financial planner, preparing for the CFP® exam, or a practitioner looking for a comprehensive reference to help serve your clients' needs, this is the ultimate guide. Developed by Certified Financial Planner Board of Standards, Inc. (CFP Board), the Financial Planning Competency Handbook gives you everything you need to meet the daily challenges of your current or future profession. The book comes with access to nearly 400 practice questions online, as well as the option to upgrade to a 28-Credit Continuing Education test for CFP® professionals based in the United States. This all-inclusive handbook covers the entire list of nearly 90 vital topics on integrated financial planning, including such major components as: General Principles of Finance and Financial Planning Insurance Planning Employee Benefits Planning Investment and Securities Planning State and Federal Income Tax Planning Estate Tax, Gift Tax, and Transfer Tax Planning Retirement Planning Estate Planning Principles of Communication and Counseling And more

The Business of Medical Practice

The financial world of a physician is quite different than most of America. Physician's face issues such as delayed earnings, high amounts of student debt, asset protection issues among other things. In this book, Shaun McDuffee and Laura Vaughn, 2 of the top financial advisors for physicians give insight on how to get started on financial planning as a young physician.

CFP Board Financial Planning Competency Handbook

J.K. Lasser Pro(TM) Before You Plan, Consult J.K.Lasser Innovative Planning That Benefits Professionals and Clients What does it take to be a successful fee-only financial planner? According to John Sestina, acclaimed "father of fee-only financial planning," the only special qualifications are a genuine desire to help people, an ability to listen, and a commitment to lifelong learning. Fee-Only Financial Planning introduces financial planners to the newest, fastest-growing niche in the financial planning field—fee for service rather than commission-based planning. Fee-only planning is attractive to the growing number of clients who want to avoid the long-term payments, lack of objectivity, limited choices, or conflict of interest that can occur with a commission-based payment structure. In his comprehensive how-to guide and easy-to-use reference, John Sestina provides in-depth coverage of the financial planning field. He covers such topics as: * The advantages and disadvantages of fee-only planning for both client and planner * Making the transition from

commission-based to fee-based planning * Building a profitable practice with varied client bases * Tailoring to your own work style the system Sestina developed over 35 years of successful private practice * Developing and maintaining productive client relationships For professionals wondering whether fee-only financial planning is in their future, or for anyone in financial services who wants to stay current, Fee-Only Financial Planning is an eye-opening introduction to one of the financial world's freshest, richest entrepreneurial careers.

The Physician's Guide to Financial Independence

Two experienced financial planners share their combined wisdom and knowledge in this handbook that focuses on helping doctors grow and protect wealth. As a specialty doctor, you shouldn't always follow the rules that others adhere to when it comes to finances. Your high income, subsequent high taxes, and significant exposure to litigation all require you to pay even closer attention to your financial goals than the average person. By using this essential wealth management and preservation handbook, you can learn Strategies to diversify your tax risk; Methods to lessen the impact of litigation; Qualities to look for when seeking professional advice; Spend more time doing the things you enjoy with the people you love. This guide includes examples, diagrams, and more to make it easy to understand your financial options and the impact of the decisions you make. Navigating this financial world isn't easy, but taking an active approach will put you well on your way to Optimal Financial Health.

Fee-Only Financial Planning

Gynecologic Care provides comprehensive coverage for the essentials of gynecologic management. It is one in a three book series which covers the breadth of the obstetrics and gynecology specialty. The other books in the series are Obstetric Care and Office Care of Women.

Optimal Financial Health

Previously published as: The financial planning workbook: managing to be wealthy for individuals and business owners / John E. Sestina and Company. [Dublin, OH]: Coventry House Publishing, [2016].

Gynecologic Care

Real Life Financial Planning for Physicians should be required reading for every physician. All of the unique financial needs of a physician have been merged into a very manageable and easy-to-implement strategy. You will learn how to prioritize multiple decisions and manage your complex financial life. The result is a financial plan that decreases worry and stress, knowing that you are in control and are systematically building and protecting your wealth. There is an amazing amount of practical advice packed into this book based on the wisdom gained from more than 15,000 individual meetings that the authors have had with their clients.

The Financial Planning Workbook

This book discusses how to structure a financial planning engagement and presents a step-by-step guide to the eleven functional areas of the financial planning process. Numerous forms, charts, client profiles, and financial statements are provided in the work.

Real Life Financial Planning for Physicians

Real Life Financial Planning for Physicians should be required reading for every physician. All of the unique financial needs of a physician have been merged into a very manageable and easy-to-implement strategy. You will learn how to prioritize multiple decisions and manage your complex financial life. The result is a

financial plan that decreases worry and stress, knowing that you are in control and are systematically building and protecting your wealth. There is an amazing amount of practical advice packed into this book based on the wisdom gained from more than 20,000 individual meetings that the authors have had with their clients.

Personal Financial Planning Handbook

Drawing on the expertise of decision-making professionals, leaders, and managers in health care organizations, *Hospitals & Health Care Organizations: Management Strategies, Operational Techniques, Tools, Templates, and Case Studies* addresses decreasing revenues, increasing costs, and growing consumer expectations in today's increasingly competi

Real Life Financial Planning for Physicians

A must-read for financial professionals and serious investors alike, this one-stop resource offers valuable insight into complex and fast-changing financial markets and advisory markets. It provides in-depth coverage of all the topics key to personal finance, including record-keeping, present and future value in investing, financial career planning, educational planning, cash management, consumer credit, housing, insurance, investment choices, retirement planning, estate planning, tax issues and much more. Packed with helpful tips and lessons, this comprehensive handbook will help professional investors in advising customers as well as provide relevant, cutting-edge information for independent investors.

Hospitals & Health Care Organizations

The Canadian Edition of the *Wealthy Physician* is one of the very few books that describes the Canadian application of the infinite banking concept. Because most books on the topic describe the American application of the concept, Canadians risk turning a fantastic strategy into a nightmare if they blindly follow the advice or structure of the concept that is promoted south of the border. This book describes the differences between the American and Canadian application, but also offers some real life examples of policies designed to maximize the growth of the cash value and its advantages for funding our own purchases, while maintaining the amazing estate transfer capacity of this approach. Doctors are often misguided and end up either losing significant sums of money in various investment or ventures, or don't get the returns they should on their money. Over the last few years, doctors have seen an increase in personal and corporate taxes that threaten their very own retirement. A properly designed, well-funded whole life policy, especially when owned by a professional or holding corporation, is the most efficient tool remaining for sheltering, protecting and growing your wealth. This book is an informative and exciting resource for the physician and all other professionals. Finally you have a one-stop guide to help make complex financial decisions easier to understand! The objective of the book is nothing more and nothing less than to give the educated medical professional a solid and easy-to-understand track to run on.

Handbook of Financial Planning

You've worked hard for the privilege of practicing medicine. Now it's time to protect and grow your well-earned wealth. Financial advisor Michael Zhuang understands the unique challenges facing physicians today. His concise, accessible guidebook can help you secure a healthy financial future for yourself and your loved ones. Many issues can impact a physician's finances, from student debt to malpractice litigation to an unreliable, ever-changing healthcare system. Often, doctors are too busy or ill-equipped to handle money matters. Zhuang makes it easy, using real-world examples and taking every factor into consideration while providing invaluable techniques for: -Minimizing taxes -Shielding your assets from being unjustifiably taken -Investing confidently and safely -Selecting the best advisors -And more Whether you're in private practice or employment-based, just starting out or nearing retirement, *Physician Wealth Management Made Easy* will help you make all the right financial moves.

The Wealthy Physician - Canadian Edition

Written by a practicing emergency physician, *The White Coat Investor* is a high-yield manual that specifically deals with the financial issues facing medical students, residents, physicians, dentists, and similar high-income professionals. Doctors are highly-educated and extensively trained at making difficult diagnoses and performing life saving procedures. However, they receive little to no training in business, personal finance, investing, insurance, taxes, estate planning, and asset protection. This book fills in the gaps and will teach you to use your high income to escape from your student loans, provide for your family, build wealth, and stop getting ripped off by unscrupulous financial professionals. Straight talk and clear explanations allow the book to be easily digested by a novice to the subject matter yet the book also contains advanced concepts specific to physicians you won't find in other financial books. This book will teach you how to:

- Graduate from medical school with as little debt as possible
- Escape from student loans within two to five years of residency graduation
- Purchase the right types and amounts of insurance
- Decide when to buy a house and how much to spend on it
- Learn to invest in a sensible, low-cost and effective manner with or without the assistance of an advisor
- Avoid investments which are designed to be sold, not bought
- Select advisors who give great service and advice at a fair price
- Become a millionaire within five to ten years of residency graduation
- Use a "Backdoor Roth IRA" and "Stealth IRA" to boost your retirement funds and decrease your taxes
- Protect your hard-won assets from professional and personal lawsuits
- Avoid estate taxes, avoid probate, and ensure your children and your money go where you want when you die
- Minimize your tax burden, keeping more of your hard-earned money
- Decide between an employee job and an independent contractor job
- Choose between sole proprietorship, Limited Liability Company, S Corporation, and C Corporation

Take a look at the first pages of the book by clicking on the Look Inside feature

Praise For *The White Coat Investor*

- "Much of my financial planning practice is helping doctors to correct mistakes that reading this book would have avoided in the first place." - Allan S. Roth, MBA, CPA, CFP(R), Author of *How a Second Grader Beats Wall Street*
- "Jim Dahle has done a lot of thinking about the peculiar financial problems facing physicians, and you, lucky reader, are about to reap the bounty of both his experience and his research." - William J. Bernstein, MD, Author of *The Investor's Manifesto* and seven other investing books
- "This book should be in every career counselor's office and delivered with every medical degree." - Rick Van Ness, Author of *Common Sense Investing*
- "The White Coat Investor provides an expert consult for your finances. I now feel confident I can be a millionaire at 40 without feeling like a jerk." - Joe Jones, DO
- "Jim Dahle has done for physician financial illiteracy what penicillin did for neurosyphilis." - Dennis Bethel, MD
- "An excellent practical personal finance guide for physicians in training and in practice from a non biased source we can actually trust." - Greg E Wilde, M.D

Scroll up, click the buy button, and get started today!

Physician Wealth Management Made Easy: How to Build and Protect Your Wealth in Uncertain Times

A guide for financial advisors who are ready to embrace new opportunities

The Enduring Advisory Firm is a book for the forward-thinking financial advisor. Financial advisement is traditionally a hands-on field, so few in the industry feel threatened by the shifting social and technological landscape. In this book, Mark Tibergien—routinely named one of the most influential people in the financial services world—and Kim Dellarocca make a compelling case for taking a closer look at technology and other big-deal industry trends in order to move the business of financial advice into the next stage of its evolution. Combining a facts-based approach with case studies and examples from the field, *The Enduring Advisory Firm* will ignite your imagination by demonstrating practical strategies for attracting clients and streamlining operations. Today's smart practice managers are focusing on emerging topics like the needs and expectations of the Millennial generation, mobile and interactive technologies, and growth planning. Responding thoughtfully to these trends, with the help of this book, could propel your financial advising business toward a more successful future. In-depth discussion of trends and forces that you can harness to reshape your financial advisement business

Case studies and examples showing how to navigate the most difficult business decisions

Innovative ideas for process improvement, more fruitful client interactions, and sustainable growth

Tips and insight for

attracting Millennial clients and talent by leveraging new technologies The Enduring Advisory Firm will inspire financial advisors, managers, and executives to branch out in ways that will lead to measurable growth. With a newfound focus on the evolution of your business, you might be surprised at where change takes you. In addition to providing RIAs with guidelines to help them succeed, all of the proceeds from this book will support the CFP Board Center for Financial Planning, a national initiative to create a more diverse and financial planning profession so that every American has access to competent and ethical financial planning advice. The Center brings together CFP® professionals, firms, educators, researchers and experts to address profession-wide challenges in the areas of diversity and workforce development, and to build an academic home that offers opportunities for conducting and publishing new research that adds to the financial planning body of knowledge. Learn more at www.CenterforFinancialPlanning.org.

The White Coat Investor

The Physician's Guide to Financial Independence should be required reading for every physician. The financial world of a physician is quite different than most of America. Physician's face issues such as delayed earnings, high amounts of student debt, asset protection issues among other things. In this book, Shaun McDuffee and Mark Miller, two of the top financial advisors for physicians give insight on how to get started on financial planning as a young physician.

Problematica del desempleo en San Miguelito

Life After Medicine provides truly unique insights, practical guidance, and strategies to ensure that your retirement will be worthwhile and enjoyable. It is based on input from 300 retired physicians (your retirement mentors) who share their experiences, impressions and advice on retirement. This research is current, unique and exclusive to Life After Medicine. It also includes our exclusive Life Goal Planning Workshop to ensure that satisfactions lost from work will be met in retirement. In addition, it provides the crucial link between Life Goal and financial planning, to truly personalize your financial plan, and and much, much more. It is a full color easy-to-read and practical book that reflects the needs of today's retirees and elevates retirement lifestyle planning to a new standard.

The Enduring Advisory Firm

Wealth Planning for the Modern Physician

[designing gestural interfaces touchscreens and interactive devices by saffer dan oreilly media 2008 paperback paperback](#)

[workshop manual hyundai excel](#)

[1998 mitsubishi eclipse owner manua](#)

[service manual for wolfpac 270 welder](#)

[pocketradiologist abdominal top 100 diagnoses 1e](#)

[pokemon red and blue instruction manual](#)

[homogeneous vs heterogeneous matter worksheet answers](#)

[a better way to think using positive thoughts to change your life](#)

[neurodegeneration exploring commonalities across diseases workshop summary](#)

[exploring the self through photography activities for use in group work](#)